

Model Assignment User Guide

Administration (Business Professional)

Level 1 Award and Certificate in Administration (Business Professional)

Level 2, 3 and 4 Award, Certificate and Diploma in Administration (Business Professional)

Scheme codes

03952, 03953, 03955, 03956, 03957, 03958, 03959, 03963, 03966, 03967, 03968

Last updated: 01/02/19

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Guide to Adapting Model Assignments

The OCR model assignments are self contained and contain a set of related tasks to address all of the assessment criteria for the unit concerned. The OCR model assignments also ensure that the appropriate level of control within the tasks reflects the intended level of the outcome of the unit.

There are a range of reasons why a centre may wish to adapt an assignment in the Administration (Business Professional Suite), for example:

- minor changes such as changes of name in the role play to make the situation more relevant to the learner
- Adapting the tasks to fit a real work or realistic working environment.

Minor changes

The Centre may change the name and gender of actors in a role play without compromising the requirements of the tasks. For example, Unit 13, Organising Meetings names the attendees at a meeting; however, if Centre staff were to adopt these roles, they may use their own names to avoid confusing the learners.

The Centre may have the opportunity for the learner to carry out the practical scenario tasks in a real work environment. An example would be a learner being given a placement or holding a position in the Post Room. Clearly this would provide an opportunity for the learner to perform tasks 2 and 3 without any alteration. Additionally, the Post Room supervisor could provide the necessary Witness Statement, provided s/he had read the sample assignment and the unit specification and was able to judge whether the learner had met the criteria. For task 1, the information sheet would still need to be completed.

Adapting the tasks to fit a real work or realistic working environment

Those intending to use real work for an entire unit do not need to incorporate it within a model assignment. They should, instead, use the unit descriptors and ensure that the activities carried out cover the assessment criteria, without any omissions.

However, if the real work only partially covers the assessment criteria, then they may adapt the tasks to meet the learning opportunities within a realistic working environment. The tasks have been designed to meet the assessment criteria of the unit specification and in changing the tasks great care must be taken to ensure that none of the assessment criteria are lost or only partially met.

The task scenario can be contextualised or amended to suit the needs of the learners. It can reflect their working environment or the realistic working environment in which they are carrying out their administrative duties. It is important that the scenario is set within a business context with a clear business purpose/objective.

An example of this is Unit 9 – Communicate with Customers. The scenario in the OCR model assignment is based on a receptionist working for Helping Hands. The procedures to be followed

when communicating with customers is provided to the learner, along with the documentation they are required to complete. The context could be changed to a receptionist working in a hotel. There would be a clear set of procedures for the learner to follow with appropriate documentation to complete. The customers in the OCR scenario are requesting services or in one case making a complaint. A similar set of customer requests/complaints could be devised within the hotel scenario, such as customers requesting accommodation, a complaint in relation to the hotel room etc. Within a working environment, learners would be provided with procedures to follow by their own organisation. They would follow these procedures and complete appropriate documentation whilst dealing with a wide range of customers.

A further example is Unit 12, Organise Business Travel and Accommodation. In the OCR assignment, the learner works for an organisation called Shoot Finder and has to arrange travel and accommodation for a photo shoot in Marrakech. A learner working in a training office could be set the task of organising travel and accommodation for a member of staff attending a conference in Berlin. The assessor assumes that as any real travel arranging must cover all of the assessment criteria, the three assignment tasks can be simplified. The learner is asked to keep notes and copies of all documents and communications.

However, when the evidence is produced for assessment, the assessor discovers that the learner received an email of the requirements and has submitted this as evidence of assessment criterion 1.1. However, there is no evidence of the learner confirming the requirements or questioning elements and so the learner has not achieved this criterion from the unit. The learner handed over the requirements to a single travel agent and did not carry out any research or obtain any other quotations, accepting what was offered. Thus the learner has not achieved assessment criterion 1.2 and cannot therefore pass the unit.

It is important, therefore, to ensure that, even if the learner is working in an environment which seems to mirror the requirements of the assignment, the tasks fit with the method of working expected of the learner in the unit and if they do not that any changes ensure that the assessment criteria are still met.

The scenario must provide the learners with the opportunity to cover **all** of the assessment criteria through a set of coherent tasks.

There can be changes made to the type of evidence required and the format it takes (providing the assessment criteria do not demand specific evidence or formats). For example, Unit 6 – Working in Administration. Task 1 requires the learners to produce a set of staff information sheets about the role of the administrator and the importance of various pieces of legislation linked to the job role. Instead they could be asked to produce a report or a staff handbook.

When making changes to a model assignment or producing a centre devised assignment, it is important that the assessment criteria relating to each task is clearly identified. This will provide a good check to ensure that all assessment criteria have been included. It is a centre's responsibility to ensure that the assignment is fit for purpose. Each assignment must:

- Be set within a business context. It cannot be looked at as just a list of academic exercises.
- have a clear business purpose/objective and must produce a useful business artefact
- Have a coherent set of tasks. No administrator wastes time by carrying out extraneous tasks, they will always be working towards a particular goal
- Cover **all** assessment criteria for the intended unit as laid down in the unit specification.

Centres are advised to refer to the Ofqual publication *Fair Access by Design*, available on the Ofqual website at www.ofqual.gov.uk. This includes guidance on:

- using language and layout in assessment materials that do not present barriers to learners
- Using stimulus and source materials in assessment materials (where appropriate) that do not present barriers to learners.

It is important that the language used and the tasks and scenarios themselves avoid discrimination, bias and stereotyping and support equality and diversity.

Generic information for Level 1 and Level 2 sample assignments

The sample assignments are designed to achieve three outcomes: one is to meet the standards laid down in the Unit Specification; the second to ensure that learners are familiar with appropriate levels of accuracy, spelling, grammar and document presentation and thirdly that learners understand the range of administrative tasks that they will undertake in the workplace. Errors should be corrected by the learner prior to submission for external moderation. Work that is not accurate should not be submitted.

It is expected that learners will have an understanding, for example, of how a report or letter should be laid out with the appropriate headings and content.

A report will include:

1. A main heading and author
2. Terms of reference or introduction as appropriate
3. Other section headings which will depend upon the content of the report
4. References or a bibliography.
5. Date of creation (may be on title page with main heading or in footer).

At the very least, sections will include an introduction, a discussion and a conclusion. A recommendations section should be included when required and for level 2 a report is expected to be more than one page. At level 3 and above the report should contain a minimum of three pages, not counting the references, bibliography or appendices.

It is very important that the unit specification is used to assess the work produced alongside the sample assignment to ensure that all assessment criteria are met and the relevant knowledge and understanding is demonstrated by the learners.

The work must be that of the individual learner. Copying directly from the internet or other sources is not acceptable. If the work is not properly attributed, this constitutes plagiarism and malpractice procedures will be invoked by the OCR moderator. If all or a significant part of the work is copied and acknowledgement of the source is given, then a learner may still fail the unit as the work is not their own and thus it is impossible to judge whether the learner has achieved the required levels of knowledge, understanding and skills.

Witness Statements must be completed by referring to the learner by name, making specific comments about their individual ability, manner and/or improvements to performance which confirms that they have been observed. Witness Statements where boxes have merely been ticked or where the comments have clearly been cut and pasted from one learner to another, without contextualisation are not acceptable. All Witness Statements must be signed and dated.

Generic information for Levels 3 and Level 4

The sample assignments are designed to achieve three outcomes: one is to meet the standards laid down in the Unit Specification; the second to ensure that learners develop good standards of accuracy, spelling, grammar and document presentation and thirdly that learners are able to undertake a range of complex tasks familiar to those in senior administrative positions. Errors should be corrected by the learner prior to submission for external moderation. Work that is not accurate should not be submitted.

It is expected that learners will have a detailed understanding of how to create complex documents.

A report will include:

1. A main heading
2. Section and subsection headings which will depend upon the content of the report
3. References or a bibliography
4. Annexes or appendices where appropriate

At the very least, sections will include an introduction, data gathering approach and outcomes, analysis, recommendations and conclusions.

Where appendices or annexes are used, learners must understand that these sections are optional reading for the reader to check assumptions or data and do not contribute to the overall pass criteria for the report. All information relevant to the purpose of the report must be contained within the body of the report.

All communications should include normal business salutations and a structured layout in the case of written communications.

It is very important that the unit specification is read alongside the sample assignment to ensure that all assessment criteria are met and the relevant knowledge and understanding is demonstrated by the learner.

The work must be that of the individual learner. Copying directly from the internet or other sources is not acceptable. If the work is not properly attributed, this constitutes plagiarism and malpractice procedures will be invoked by the OCR moderator. If all or a significant part of the work is copied and acknowledgement of the source is given, then a learner may still fail the unit as the work is not their own and thus it is impossible to judge whether the learner has achieved the required levels of knowledge, understanding and skills.

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Unit 1: Working in business and administration

Task 1

This task requires a report with headings covering a range of activities and for this the knowledge, understanding and skills in the unit specification provide a good starting list. It covers the main areas but learners with some experience may have other legitimate examples. They must provide clear explanations of each activity which should be sufficiently detailed to allow someone unfamiliar with administration to understand what the tasks would entail. Bulleted lists of single phrases or clauses are not sufficient.

Assessment criteria 5.1 and 5.2 related to the confidentiality of information may also be included within this report.

Task 2

The leaflet can take a number of forms and learners will not be penalised or rewarded for taking a particular approach. The important word is “how”; a list of team working terms and their definitions is not sufficient. Each element must directly link to an example of how it helps to improve or support an administrative process.

Task 3

Here it is important that the learner is given straightforward instructions to complete an administrative task, which results in a product such as a word processed document. If the document being produced for task 3 is also being used to evidence task 8, the learner must be interrupted whilst processing the document to ensure coverage of the assessment criteria.

Task 4 - 9

Here it is important that the learner is given access to a range of office equipment that is frequently used by administrators.

Task 10

This task is straightforward but do make sure that the Witness Statement provides the rationale for assumptions that the learner has made.

Unit 2: Creating business documents

Task 1

A set of bullet points is only acceptable where the points are expanded to state the purpose of each document and when each document is most likely to be used. At level 1 this may only be two or three lines of explanation.

Task 2

Here the learner is required to give a brief factual statement on why businesses may use templates. This may take one of several forms such as notes or a paragraph outlining the reasons.

Tasks 5 to 8

It is important that the learner's work is proof-read, assessed and any amendments made PRIOR to submission. All documents must meet the standard expected within the business world.

Unit 3: Making and receiving calls

This unit relies heavily on Witness Statements. It is important that the Assessor reads the general guidance on Witness Statements given in the generic information, as the external moderator will rely on the quality of the testimonies to judge whether the learner has achieved the learning outcomes. It is also possible to record the learner making and receiving calls and for this to be provided as evidence. However, the assessor is responsible for ensuring that the following are met:

- the format of the recording can be read by the most widely available systems
- the sound recording is of a high quality and with sufficient volume for the external moderator to be able to clearly hear the conversations which are taking place
- The external moderator is provided with the necessary information, eg position on the disc or tape where the work for each learner resides and also the name of the learner, so that the moderator can identify the correct recording for each learner.

Task 4

The leaflet must be entirely the work of the learner. Any sources or quotations must be cited and referenced. If the work places substantial reliance on direct quotations then the assessor will need to consider whether the learner has actually demonstrated achievement of the assessment criteria or merely an ability to investigate and identify relevant sources.

Unit 4: Welcome visitors

Tasks 2 to 4

Please read the generic guidance on Witness Statements presented at the beginning of the assignment. If the role play does not fulfil all of the expected outcomes then it is important that a question and answer session is used to confirm the learner's achievement. An alternative might be a video or audio recording of the role play and/or the follow up discussion, noting the points raised in task 1 above.

Unit 5: Handling mail

Task 1

The information sheet must achieve the assessment criteria 1.1 to 1.3. It is important to recognise that while all three require the learner to make a series of statements on the importance of handling mail in an efficient and secure manner, it is not sufficient to provide a bulleted list or description of the delivery of mail. Criterion 1.1 requires an explanation of how efficient distribution of mail benefits a business; similarly 1.2 asks why inaccuracies or delays may cause a negative impact. In both cases, learners may find it easier to provide some relevant examples to assist them with the explanations.

Tasks 2 and 3

Assessors should ensure that they are conversant with the generic information on Witness Statements provided at the beginning of the unit. Where a particular number of tasks are required the Witness Statement must make note of this or if the learner has had to complete a detailed mail log then this may be used instead. Learners must demonstrate using a range of skills including using franking machines or scales, the latter for checking the postage. Dispatch may be interpreted as delivering mail to the post room by a particular time.

If learners have been given a training opportunity within the organisation's internal mail system, then the Witness Statements may be written and signed off by the line manager and the assessor will then countersign the testimony and confirm that they have explained the assessment requirements to the line manager and that they were interpreted appropriately for the witness statement.

Unit 6: Working in administration

Task 1

The information sheets should provide a clear and logical description of the role of the administrator, their relationship to others, and the importance of legislation which affects the world of administration, i.e. data protection, health and safety and organising the work place. The work must be that of the student and assessors should ensure that learners understand that copying work from other sources does not demonstrate the understanding and knowledge of these areas.

Although the particular layout is not subject to assessment, the language, spelling and grammar must be accurate and appropriate for a business situation. Learners are expected to make any amendments and assessors to assess the resubmitted work prior to submission for external moderation.

Tasks 2 to 5

The assessor must complete Witness Statements in line with the generic information given at the start of the assignment.

Task 6

The learner must reflect on their experience and strengths and weakness as they relate directly to tasks 1 to 5. Therefore, it is not appropriate for comments such as “I must learn to get up earlier” or “I must try to get into college on time”. Laudable though these sentiments are, they do not refer directly to the learner’s experience of carrying out the particular tasks and what they have learned about their own capabilities and areas for development as a result.

Unit 7: Written business communication

An important role for an administrator is the ability to assimilate and analyse information and make appropriate deductions which result in sensible actions being taken. Thus the learner's email must accurately reflect the content of the line manager's email and the associated documentation presented in the assignment. The scenario presented a minimal amount of information and learners need to interpret the material - they may discuss with their tutor the appropriateness of the interpretation. They must provide, within the documents, a rationale for any deductions that they make which must be reasonable within the business context.

The documents must be checked for spelling, grammar and business language and style.

Task 1

This should be a formal response as the matter may have serious consequences for the business. It must be presented in a logical and lucid manner making clear which parts of the complaint are justified and which are not.

Task 2

In the context of this task, the holding letter is a formal way of acknowledging the complaint and letting the customer know that their complaint is being dealt with. The formal holding letter must be presented in a suitable format using appropriate tone and language. The correct salutation must be used; informality or other errors are not acceptable.

Task 3

This report should not be presented within the body of a memorandum or email, although it can be forwarded as an attachment. It must be presented in line with the generic advice given at the beginning of the assignment. Recommendations and conclusions must be clearly derived from the findings. At this level, it is expected that paragraphs and sections would be numbered and the report would be of at least two pages in length.

Task 4

The leaflet must be well structured, the original work of the learner and carefully checked for errors of content, spelling or grammar. Any errors should be corrected prior to submission.

Unit 8: Career planning in administration

Task 2

The learner must include a career path from within a national or international business. It does not follow that a learner is expected to apply for a job overseas or located miles from home but to look for opportunities with companies who have geographically disparate locations where the learner may wish to work in the future. They would have to recognise the additional issues which they would have to address in terms of transferable skills such as behavioural issues or knowledge of a foreign language for example.

Task 3

Learners using flowcharts must fully understand the concept and design techniques prior to designing a recruitment process. Whichever method is used, the learner should include a process on how to deal with a rejection letter, seeking feedback for example.

The list or flow chart must be the learner's own work and must not be copied from another source.

Task 4

The evidence may be presented as a slideshow with associated detailed speaker notes, a booklet or handout and it must include career and personal benefits.

Task 5

It is acceptable for the learners to use existing PDP forms available within the organisation or a template which has been designed by the assessor or the learner. However, it must cover the assessment criteria and knowledge and understanding found within the unit specification.

Task 6

There is no specific style associated with this task but it must be a professional presentation of the learner's skills, experience and achievements and contain the information laid down in the unit specification. The CV must be accurate and without spelling or grammatical errors, otherwise it would not be fit for the purpose of recommending the learner for consideration for a job.

Tasks 7 and 8

These two tasks are linked as the final choice of job will be used to prepare for a job interview. There is no specific number of job opportunities which the learner should address but it is expected that the learner will consider a range of possible future career choices in order to identify a particular advertisement to take forward. The job selected should be detailed enough to allow the learners to produce a reasonable "assessment" of their suitability for the specific job. A simple job advertisement is unlikely to provide the required information for a detailed assessment.

Unit 9: Communicate with customers

The generic information should be sufficient to deliver and assess this unit.

Unit 10: Teamwork in administration

Learners will clearly share evidence with other team members so as to provide a lucid account of the team working activity. However, the learner's own contribution must be clearly identified either within the text or through Witness Statements and be of sufficient depth and breadth to meet the assessment criteria. It is unacceptable to produce a team portfolio; although there may be some crossover in contribution for certain pieces of evidence, each individual piece must clearly show who has produced it and the contribution made by each learner.

Task 1

The learner must produce a report or presentation on effective team working, drawing on the knowledge, understanding and skills laid down for assessment criteria 1.1 and 1.2 within the unit specification. A set of single phrase bullet points is not appropriate for this task as the learner must provide evidence of understanding and thus will need to produce a paragraph or more on each of the roles and responsibilities. Evidence must include descriptions of the concepts included together with a rationale of why they support effective team working. The learner must also explain why team working is more productive than working alone. It is expected that this is at least one side of A4.

The roles and responsibilities of team leader, team member and resource investigator could be included and may be used to illustrate some of the skills required for effective team working. The descriptions, explanations and definitions must be in the learner's own words, although alternative team roles could be covered.

Task 2

The evidence must include a schedule or plan of the project which identifies tasks, the individual responsible for ensuring that a particular task is completed, deadlines, priorities and resources. The role and responsibilities of each individual team member must be clearly defined and documented.

Meetings may be minuted, using an appropriate style which includes actions and the individual responsible for each action. AV material of meetings may be presented instead of minutes or the Witness Statement as long as the assessment criteria can be easily identified by the assessor and moderator and the material is in an easily accessible format. AV material should be indexed so that external moderators can easily identify the evidence.

Task 3

Some of the evidence collected for task 2 may be relevant to task 3 and *vice versa*, thus the guidance provided for task 2 applies equally to task 3. However, should the team wish to use photographic evidence they need to identify individuals and the context in which the photographs were taken, otherwise the evidence cannot be authenticated.

Task 4

The learner must provide a logical discussion of the performance of the team, their own performance and that of the other team members. They should use an appropriate tool such as a SWOT or SLOT analysis to identify the strengths and weaknesses of their approach. It is important that learners understand the process so that they accurately reflect the experience and outcomes of the group activity within the analysis process. The conclusions arising from the analysis should clearly relate to the success or otherwise of the group work.

Feedback from others, guidance from the assessor and self-evaluation and the findings of the discussion on performance should be used by the learner to produce a personal development plan to enhance their team working in the future.

Unit 11: Financial transactions

Task 1

The checklist should be accurately completed. If the learner has misunderstood or made an incorrect statement then it should be returned for correction. Errors in the checklist mean that the learner has not yet met the required standard and will be rejected at moderation.

Tasks 2, 3 and 5

A Witness Statement, while confirming that the learner has carried out task 2, does not mitigate the submission of a petty cash book or spreadsheet which has incorrect entries. Errors mean that the learner has not achieved the assessment criteria and the work should be returned to the learner for correction.

Similarly for task 3 the only evidence is the print out of the record of payments and must be returned for correction.

Task 4

The issue of plagiarism is important here, as is the accuracy of the information provided and the need for accurate spelling and grammar. For such an important area, the information must also be presented in a logical and structured manner.

Unit 12: Organise business travel and accommodation

Tutors may need to amend the dates given in the model assignment in order to allow the learners to produce evidence that is in line with the actual year in which the tasks are undertaken.

Task 3

Clearly learners cannot authorise payment either via cheque or credit card with a real company for the agreed travel arrangements, unless they are actually in the work place and the scenario has been changed to allow for a real-life event. However, learners can gather all of the costs together and write a letter/email to the “travel agent” confirming that they wish to confirm the arrangements and asking for an invoice.

Unit 13: Organise meetings

Task 1

This may be carried out either face to face or through emails. The latter can then be used as evidence in place of the notes stated in the task details. The confirmation of booking can be an email or memorandum confirming the booking to the learner's line manager.

Learners will need to inform the venue of the special dietary requirements of Paul Smith who is a vegetarian (as identified in the brief). Although the brief for this task does not particularly require the learner to request food, for the purpose of this role play, it would be appropriate to advise the venue that any refreshments must include a vegetarian option.

Task 2

The quality of the notice of the meeting and agenda are important. They should be accurate and checked for spelling and grammatical mistakes and corrected before being accepted for distribution. The assessor should read the generic statement at the beginning of the unit to ensure that they are fully conversant with the production of Witness Statements.

Unit 14: Handling diary systems

Tutors may need to amend the dates given in the model assignment in order to allow the learners to produce evidence that is in line with the actual year in which the tasks are undertaken.

It is important that the entries are accurately entered and any mistakes corrected prior to submitting the work for moderation. Although Witness Statements are available for this unit, the learner may find it easier to collect evidence of communication with attendees and others involved in organising the meeting through emails or memoranda. Where learners have to provide written evidence, formal documentation should be accurate and checked for spelling and grammatical errors. If personal notes are included then these should be legible to the assessor and moderator.

It is expected that the amended/updated diary is presented as evidence for each stage; otherwise the moderator can not confirm all entries have been made/amended correctly.

Unit 15: Producing complex business documents

All of these documents must be written using appropriate language and tone for the circumstances for which they have been created. They must be accurate and fit for business.

Task 1

The report will have to present information in a logical and professional manner with appropriate sections and subsections. The recommendations should be clearly deduced from the content of the report. It is expected that the report is a complex document and extends to at least two to three pages.

Task 2

A letter is the only choice for this task. This should be a professional letter, conciliatory but making clear the limit of the Council's responsibility and clarifying the various steps which were taken by Council staff. The work must have been checked and corrected prior to submission. The final letter should be accurate and fit for purpose.

Task 3

Here the learner has an opportunity to demonstrate their ability to write an article based upon the events and evidence surrounding the Council's repair and refurbishment programme. The content should be well laid out with a logo or strap line, paragraphs and headings. The wording should suit the purpose of the publication.

Task 4

Devising a questionnaire is not an easy task but learners must demonstrate that they recognise the difference between quantitative and qualitative data within their questionnaire. The language must be clear and jargon-free and appropriate for the audience. The questions being asked in the questionnaire should generate the kind of information that would be of use in the context given.

Again, the documentation must be checked for errors and corrected prior to submission, just as it would be in a real work situation.

Unit 16: Understanding functions and roles within business organisations

This assignment requires the learner to acquire detailed knowledge of two different business organisations, one large and one an SME. There is no absolute definition of acceptable sizes for these categories. The main requirement is that the two chosen business organisations must have very different organisational structures to enable learners to complete effective and valid comparisons.

Wherever possible, the learner should include at least one business with which they are familiar. This may include somewhere that they have worked or undertaken work experience, the organisation where a close friend or family member works or even the centre itself. This unit requires a significant amount of research and the use of clearly referenced diagrams, data, etc so it is very important to note that plagiarism is an inherent danger in this type of assignment. All learners are likely to need support in finding information on at least one of the two organisations.

The choice of organisations should be negotiated by the learner and tutor and may include local businesses. It is unlikely that learners will be able to achieve this unit if they solely rely on internet research for both businesses.

Although the task states that assessment will focus on content and not layout, this is a level three unit and thus it is expected that the learner will provide a logical, well-structured document which will assist the reader in understanding business functions.

The document should be proof-read and errors corrected prior to submission.

The functions must be clearly defined and demonstrate how they are interlinked to assist the business. Most functional areas have links to a number of others and these should be identified with the description or diagrams.

The word count is a guide; clearly the document must be substantial due to the nature of the content but learners should also be discouraged from any possibility of repetitious or unnecessary content just to achieve a significant word count.

AC 2.2 requires an analysis of how the main functional areas in business organisations interact and a description is not sufficient to meet these requirements.

For AC 4.1, learners are required to describe roles and responsibilities within levels of a business organisation– if they produce a bulleted list this only identifies the roles and responsibilities and will not meet the requirements.

For AC 5.2, learners must analyse how different stakeholders may have different aims and objectives.

Unit 17: Supporting recruitment and selection procedures

Task 1

The learner must investigate the principles of job analysis and explain why such analyses support the production of more appropriate job descriptions. The learner can choose how to present the information either in notes or emails but they must be sufficiently detailed for the reader to understand the concepts and the value of undertaking such a task. Although this is an internal communication, the learner will need to ensure that the content, language, spelling and grammar are correct in order to provide a professional image to Sophie, whom they are seeking to convince of the benefits.

Task 2

The important words here are “analyse” and “evaluate”. This means that the learner will have to consider Katiana’s own description of her role and organise them into the themes, considering their importance and value to the organisation and the General Manager. From these, the learner will need to decide which skills, experience and qualifications are required; collecting them together under headings such as “essential” and “desirable” and the responsibilities and tasks along with other relevant information such as reporting lines.

It is important that the evaluation and analysis provides a sufficiently detailed and accurate job analysis to enable the learner to create an appropriate job description and person specification in task 3.

Task 4

The job description and person specification must meet equality legislation standards and thus learners may need guidance on where to find and how to interpret this information. A group discussion may be an appropriate approach here. The language should meet standards of content and accuracy as it represents the organisation to those seeking employment and those who provide career developments, advertisers and other local and national bodies.

Task 5

Learners should review a range of job advertisements to identify the major features required and how they should be laid out in order to attract the attention of possible employees. The suggested word count is designed to ensure that the learner focuses on the important points and the fact that advertisements are costly and often charged by the word.

Again, the wording must conform to equality legislation requirements.

Task 6

The letter of invitation should be formal, accurate and include information such as the time and place for the interview, the name of the interviewer and a contact number in case the attendee has any additional questions or if there is an emergency.

Unit 18: Verbal communication in business

The generic information covering Witness Statements is very important in this unit. Audio or audio/visual recordings of the telephone conversations are acceptable but they must be recorded in an easily obtained format so that they can be moderated by the external moderator. There are often issues over the quality of the recording: centres must ensure that the learner and any other individual engaged in conversation are audible to the assessor and moderator. Additionally, all recordings should be annotated or labelled so that the moderator can easily find the relevant evidence.

Unit 19: Support business meetings

Role play is an important element of this unit and the assessor or one of the assessment team will need to play the role of the Finance Manager. The previous minutes and associated documents are not provided and thus the assessor will need to obtain or create a set of documents for the learners to use for task 1.

Unit 20: Organise a business event

If the learner does not have access to opportunities for organising a real business event, this unit scenario should be run as a role play with a member of the assessment team or another suitable individual acting as line manager. It is important that the unit specification is considered alongside the unit to ensure that all assessment criteria are met.

Task 1

Learners are expected to use the aims and objectives provided in the model assignment to identify the requirements for the annual event, the venue and the types of delegates. A learner would not be demonstrating sufficient coverage of AC1.1 by copying the information provided in the scenario and not making decisions on where the event will take place and the types of delegates.

The learner is also required to identify a speaker or presenter for the event (assessment criterion 1.2) but this is not overtly stated within the task. The assessor must ensure that learners do address this issue as part of their investigation.

Task 3

In order to deliver this unit the centre must have the ability to simulate the booking of a venue and associated resources and refreshments. If possible, the centres should set up an email box to which learners can send their requests for information and receive answers and confirmations. Alternatively, recorded telephone conversations or Witness Statements may cover the same evidence.

Unit 21: Reviewing and developing office procedures

Task 1

The unit specification must be used to ensure that all of the assessment criteria are met within the office procedure guide.

This is a level 3 unit and thus the learners are expected to provide comprehensive and detailed guidance which is logically and lucidly presented. The document must be proof-read and any errors corrected and resubmitted, if necessary, prior to moderation. A series of bullet points will not be sufficient to achieve a pass.

Task 2

The assessment criteria clearly state that office procedures must be reviewed and evaluated. Thus the questions listed in task 2 are examples of the kind of areas which need to be considered for the range of procedures current within the company. Learners should not answer the bulleted questions as they are written but use them as an aide to remind them of the areas to be critically examined and judged as fit for purpose or in need of improvement for each of the procedures. Guidance from the tutor may be required to ensure that learners have fully understood the office procedures which would be appropriate to the business.

Task 3

It is important that the tutor ensures that the learner understand the concept of procedures. The learner is expected to create at least one detailed procedure for the sales order processing and for the order fulfilment functions. These will be reasonably complex as the learner breaks down the individual steps which ensure a successful sales environment. It is not enough for the learner just to provide the draft stages; they must provide the reasons for the choice of methods and actions. Although only a draft is presented, the draft refers to the fact that the document has not been approved and may be altered following consultation. The presentation must be professional and the content checked for accuracy. The documents should be proof read and errors of spelling or grammar corrected prior to submission.

Task 4

The creation of a training plan requires an analysis of training needs to be undertaken prior to the planning process. Areas to be covered would include:

- Business needs analysis. Why will it solve a business problem?
- User Analysis. What level of knowledge or skill does the participant have? What training would improve these? Who could deliver the training?
- Work analysis. Specify the main duties and skill level required of the trainee.

Unit 22: Carry out research and prepare a report

The central theme of this unit means that learners will be working with information that they have collected from a range of sources. They need to be carefully guided in good referencing and citing and also on the need to ensure that they review any information and comment upon it. Should they wish to quote directly, then they need to understand that such a quote should not be more than two or three lines. The final report should be a complex document and follow a standard report format. If the report is not a complex document, presented in the correct format, the learner cannot achieve the unit.

Task 1

The requirement for a project plan does not require the level of a detailed plan as identified in a project planning system such as PRINCE2. A research project plan will include a significant number of traditional project planning elements and significant detail. All of the elements identified in the task descriptor should be included, including the timescales, targets and milestones. Learners may find it useful to use a Gantt chart or similar tool to create and later manage these activities but it is not a requirement.

Task 2

The research undertaken must relate to realistic opportunities for diversification. Learners are expected to use their initial ideas, discarding or adding to the list as they research and evaluate the information they need. Learners are expected to identify and use a range of research sources and methods, and it is expected that learners will be provided with support in identifying these elements by the assessor, if they have not previously carried out a research project. It is not sufficient to produce a string of quotations from the internet.

The learner may maintain their research source log electronically or on paper or cards because they will need to refer to this as they select and collate the most relevant possibilities. It is not necessary for learners to download and print information from the internet; they must read and make notes on what they have found for future reference. However, questionnaires, notes from meetings and discussions and copies of the diary or Gantt chart showing progress against the timescale, etc must be kept and used as evidence alongside the research notes.

Unit 23: Apply legislation affecting organisations

Task 1

The unit specification lists the legislation and regulations which need to be considered by the learner and the ability to apply them to situations in the work place. It also makes clear that the learner must be able to locate appropriate sources for these areas. The task requires learners to provide information on where the reader can find further advice on these areas. This refers directly to assessment criterion 1.1 and therefore, either within the text of the leaflet or in a separate section at the end; the learner must provide clear references to the sources. Failure to do so will result in the learner failing to achieve the unit.

Learners will not be penalised for not using a standard Harvard referencing approach but the layout must be logical and correct and allow the reader to quickly access the information. Web addresses should include the date on which they were accessed by the learner when creating the leaflet.

Task 2

Learners will not be penalised for the layout of the slides but as this is to be presented to staff by the learner's line manager (see scenario for details) it is important that the slides have been proof-read and any spelling or grammar errors corrected.

Task 3

The unit specification makes clear that the knowledge and understanding includes ensuring suitable training occurs prior to carrying out risk assessments. The task, however, does not refer to this. If the learner has not already had experience of or been trained in risk assessment, then it is expected that the assessor will provide the necessary training to ensure that the learner understands the purpose of risk assessment and the procedures and paperwork to be completed when carrying out and reporting the findings.

Unit 24: Working in an administration team

Task 1

The learner can approach this in two ways, firstly using experience of team working to aid their evaluation of the roles and responsibilities or secondly to approach it from a purely role play perspective. It is important to note that, although not overtly mentioned in the task, there is an expectation that the report will also cover relevant areas of assessment criterion 2.1 which relate to working with others in an administrative team in accordance with organisational requirements. The report should be laid out using a layout as outlined in the generic task information.

Task 2

This task focuses on the learner's skills development while working in a team environment. This should cover a range of the knowledge, skills and understanding relating to all of the assessment criteria. The learner is expected to fully contribute to the team activity and to contribute to all aspects of the work, from direct control and delivery to supporting individual team members who are struggling.

Task 3

The team members, especially if they have no experience of reviewing team activities, may find it difficult to admit to disagreements and failings within the team and if they do, they may become negative and even aggressive. The assessor, acting the role of line manager, will need to manage the review process and ensure that the team understand the process and the purpose, which is to learn and improve, rather than to accuse and punish.

Again, the use of SWOT/SLOT analyses needs to be practiced prior to applying them to the real team experience. Assessors should ensure that learners are fully prepared to carry out these activities.

Unit 25: Working in a senior administrative role

This unit cannot be achieved purely through simulation or as an academic exercise and therefore no scenario is given in the model assignment documentation. A senior administrator must have experienced the leadership of teams carrying out complex tasks over a period of time. The learner needs to experience the pressures of meeting deadlines, conflicting priorities and other difficulties faced by senior administrators in the work place. The assessment criteria also require high level skills, knowledge and understanding which, again, need to be developed over a period of time.

Unit 26: Analyse financial information

This is a level 4 unit and requires the learner to develop an in depth understanding of financial analysis. Therefore, learners without this background will need the support of a tutor or mentor who has a clear understanding and experience of financial management and analysis or who has studied finance. This unit is not suitable for learners who do not have this support.

This unit requires the production of a detailed report and therefore the generic information on report writing provided within this document should be followed, especially with respect to the use of appendices, annexes, referencing and citations. As a level 4 unit, the report content, without these elements should be at least three pages in length, providing detailed information on, for example, the purpose, methods used, findings and analyses.

Unit 27: Chair a meeting

This unit requires the learner to act as Chair for a complete meeting and each learner must achieve all the assessment criteria individually – it is not sufficient to rotate the tasks or acting as Chair amongst several learners on one individual occasion.

Unit 28: Present complex business information

The key aspect of this presentation is that the information being given must be complex and related to a business issue at a level of difficulty that is fitting for level 4. Please see the 'introduction to the tasks' section of the tutor notes in the model assignment for further explanation.

Unit 29: Train and develop staff

This is a level four unit and if run as a role play, the associated skills, knowledge and understanding require significant input by those involved. The scenario is relatively brief and in order to achieve the complex assessment criteria, a great deal of preparation will be needed not only by the learner but also by the person playing Heidi, the learner's subordinate.

Task 1

The learner without experience in this area will need to undertake significant research or other learning to achieve the expected knowledge, understanding and skills to successfully plan and carry out a staff development review and devise a set of organisational and departmental objectives based upon the scenario. The individual taking the role of Heidi will need to have a detailed personal and professional history provided for her or be given the time and support to produce a history for herself. Additionally, there will need to be liaison between the tutor and the learner to determine whether a set of forms with associated notes should be prepared prior to the start of the role play or whether a more informal approach can be used. The advantage of the former is that the learner can create the documentation, based upon their research and seek advice as to whether they have understood what is required prior to commencing the role play.

An essential resource is a quiet room where the interview can take place without interruption, as would be expected in the real world.

The learner will need to have a strong grasp of the softer skills required in creating a rapport with Heidi, good understanding and application of verbal and non-verbal communication, providing a positive and supportive image, etc.

Where the interview is not recorded, the Witness Statement will need to be very detailed, providing evidence of soft and hard skills and their application.

Task 2

The development and preparation of the resulting training program will require the learner to produce or be given a set of forms covering the training program itself and the timescales. Where specific training needs are identified, research must take place to identify appropriate internal or external sources of training. The identified training resources, supporting rationale and costing will need to be recorded and approved using a procedure set up prior to the commencement of the unit by the tutor.

Summary of Changes - February 2019

Section	Change
Cover	Updated OCR Logo
	Removed Scheme 03954 (Level 1 Diploma)
Throughout	Minor grammar and punctuation changes